

ACRM APPLICATION FOR SCHOOLS AND COLLEGES

1 INTRODUCTION

1.1 Overview

Customer Relationship Management (CRM) as the name suggests, the primary focal point is placed on the customer. The key objective is to increase customer value over time by increasing customer loyalty. If a company develops better customer relationships, it also improves business processes as well as its profits. In general, CRM is a more efficient automated method used to connect and improve all areas of business to focus on creating strong customer relationships. All forces are coupled together to save, improve, and acquire greater business to customer relationships. The most common areas of business that are positively affected include marketing, sales, and customer service strategies.

Customer Relationship Management (CRM) helps create time efficiency and savings on both sides of the business spectrum. Through correct implementation and use of CRM solutions, companies gain a better understanding of their strongest and weakest areas and how they can improve upon these. Therefore, customers gain better products and services from their businesses of choice. In order to achieve better insight on CRM, it is essential to consider all of its components.

Customer relationship management (CRM) is a business strategy that spans your entire organization from front office to back-office. It is a commitment you make to put customers at the heart of your enterprise. The right CRM strategy and solutions can help you securely, reliably and consistently:

- Delight your customers every time they interact with your business by empowering them with any time, anywhere, and any channel access to accurate information and more personalized service.
- Reach more customers more effectively, increase customer retention and boost customer loyalty by leveraging opportunities to up-sell and cross-sell and driving repeat business at lower cost.

- Drive improvements in business performance by providing your customers with the ability to access more information through self-service and assisted-service capabilities when it is convenient for them.
- Enable virtualization in your enterprise as more of your people and resources extend beyond your offices and around the world.
- Balance sophisticated functionality with rapid implementation and effective support for a faster return on your CRM investment.

Today's customers face a growing range of choices in the products and services they can buy. They base their choices on their perception of quality, value, and service. Each consumer has a specific behavior. But buying habits are sometimes difficult to understand. Therefore companies always want to gain some insight about consumer behavior and habits in order to better control this behavior. Having an impact on consumer behavior means being able to change consumer's perception of the product or service, to establish a relation between the company and its clients.

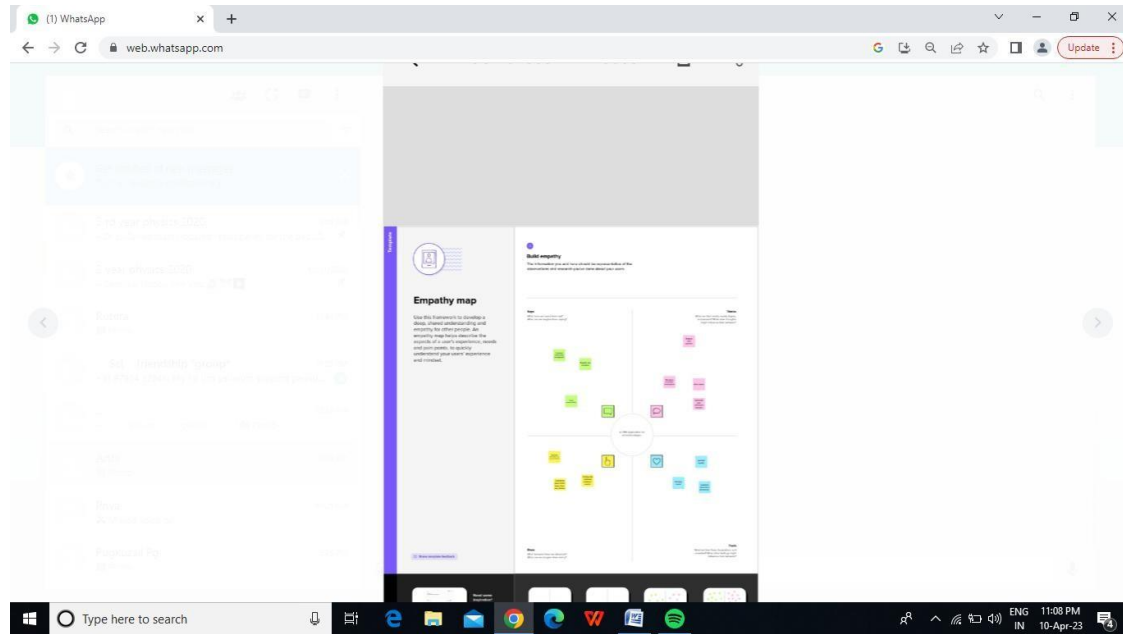
Another concept which is closely related to CRM is the Customer Relationship Marketing, which is a practice that encompasses all marketing activities directed toward establishing, developing, and maintaining successful customer relationships. The focus of relationship marketing is on developing long-term relationships and improving corporate performance through customer loyalty and customer retention.

1.2 Purpose

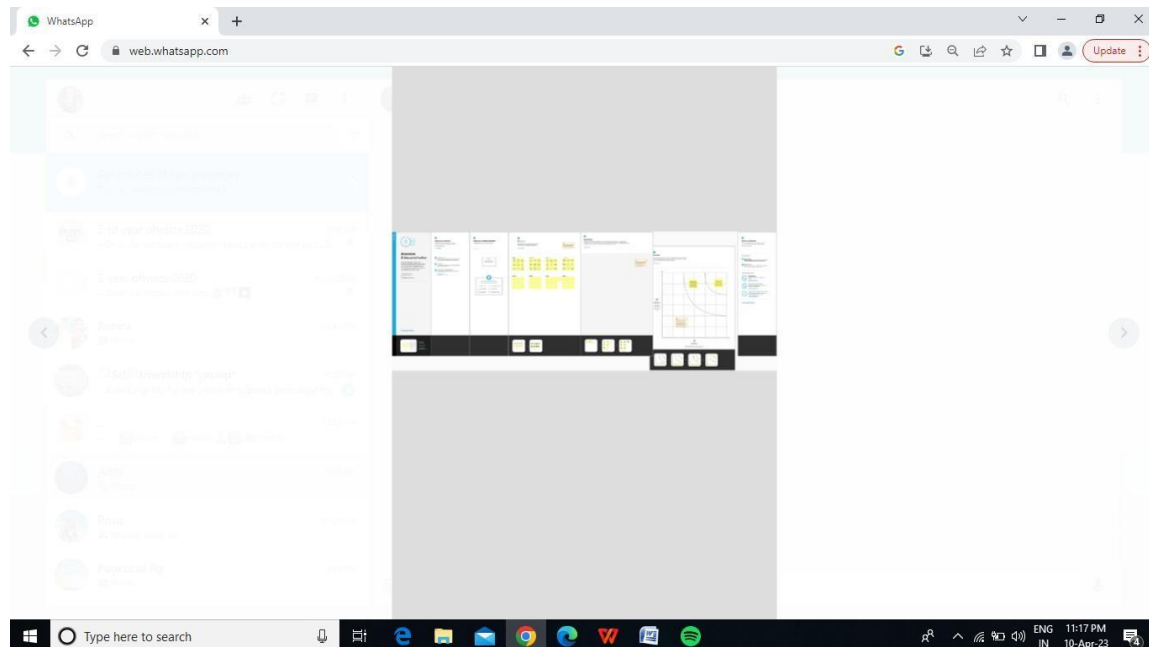
Customer relationship management (CRM) is a technology for managing all your company's relationships and interactions with customers and potential customers. The goal is simple: Improve business relationships. A CRM system helps companies stay connected to customers, streamline processes, and improve profitability.

2. PROBLEM DEFINITION & DESIGN THINKING

2.1 Empathy Map



2.2 Ideation & Brainstorming Map



3. RESULT

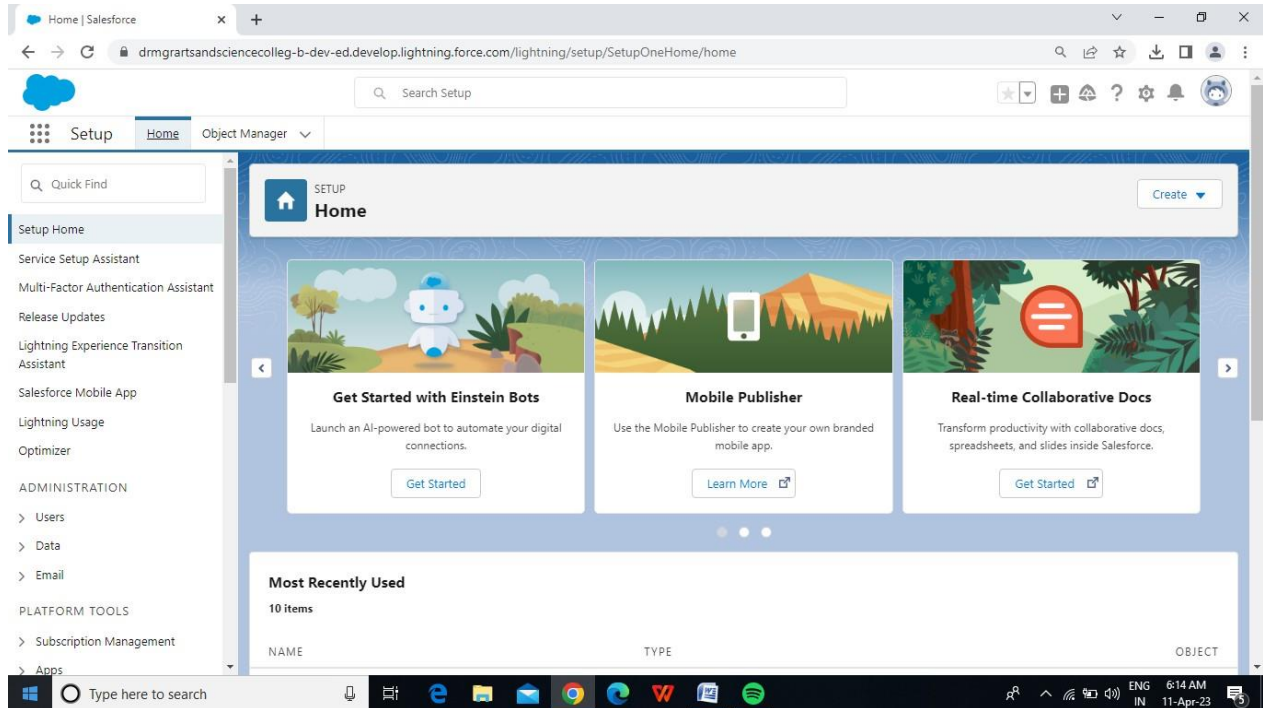
3.1 DataModel:

ObjectName	FieldsintheObject	
School	FieldLable	Datatype
	Address	TextArea(255)
	Created By	LookUp(User)
	District	TextArea(255)
	LastModifiedBy	LookUp(User)
	Owner	LookUp(User,Group)
	School	TextArea(255)
	School NameState	Text(80) TextArea(255)
Parent	FieldLable	Data Type
	Created By	LookUp(User)
	LastModifiedBy	LookUp(User)
	Owner	LookUp(User,Group)
	ParentAddress	TextArea(255)
	ParentName	Text (80)
	ParentNumber	Tet(80)
Student	FieldLable	Data Type
	Mark	Number(18,0)
	PhoneNumber	Phone
	Result	Picklist
	School	Master-Detail(school)
	StudentName	Text (80)

3.2 ACTIVITY&SCREEN

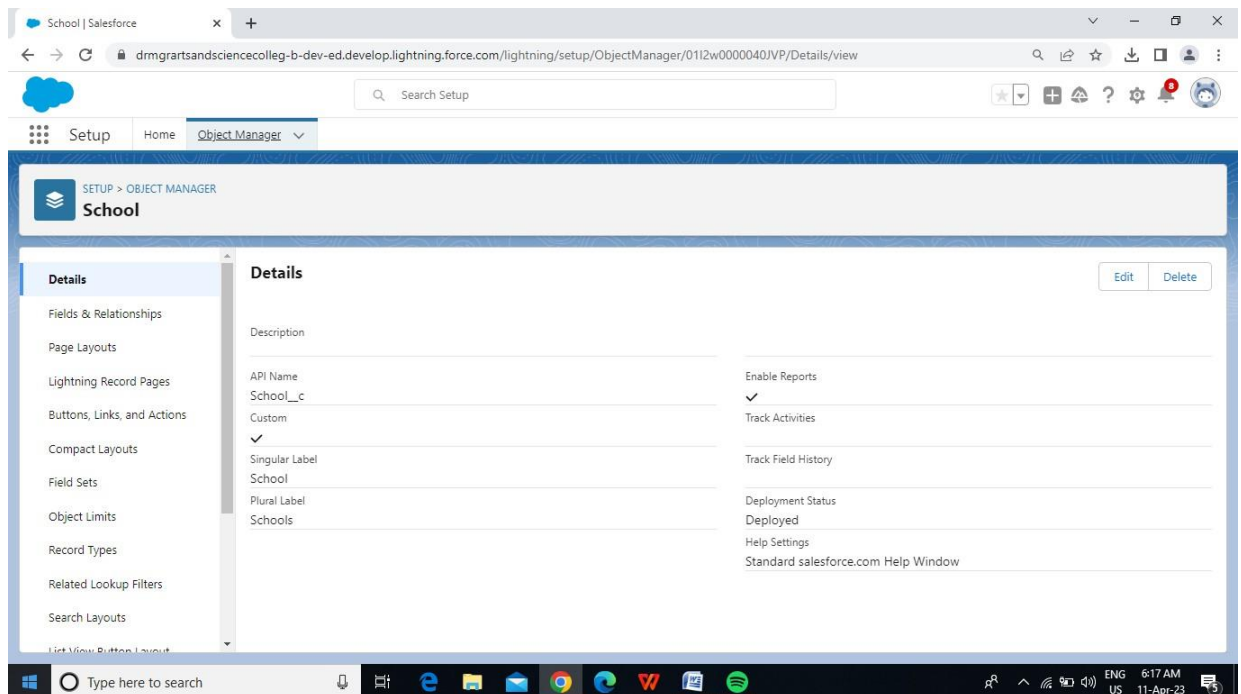
Milestone-1:

Activity:CreationDeveloperAccount



Milestone-2:Object

Activity-1:CreationofSchoolObject



Activity-2:CreationofStudentObject

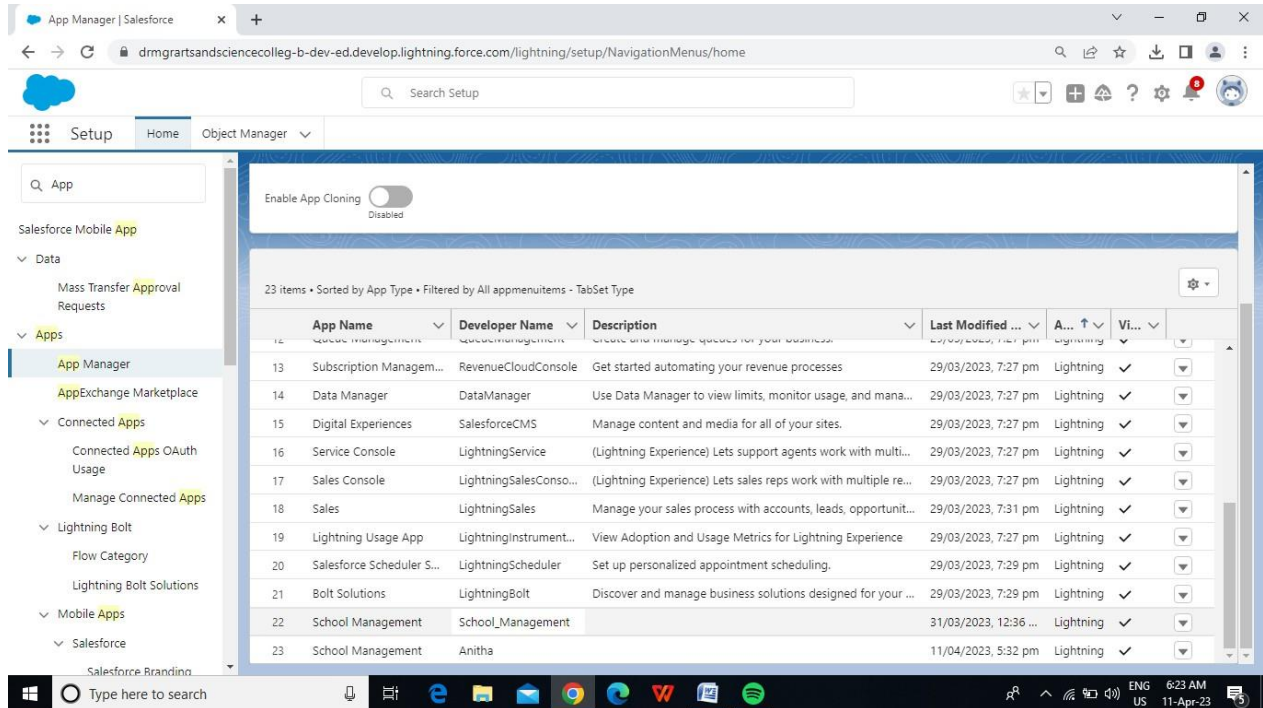
The screenshot shows the Salesforce Setup interface for the 'Student' object. The browser address bar displays the URL: `drmgrantsandsciencecollg-b-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w0000040FD2/Details/view`. The page title is 'Students | Salesforce'. The left sidebar contains a navigation menu with options: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main content area is titled 'Details' and includes an 'Edit' button and a 'Delete' button. The 'Details' section is divided into two columns. The left column contains the following fields: Description, API Name (Student__c), Custom (checked), Singular Label (Students), and Plural Label (Students). The right column contains the following fields: Enable Reports (checked), Track Activities, Track Field History, Deployment Status (Deployed), and Help Settings (Standard salesforce.com Help Window). The Windows taskbar at the bottom shows the search bar and several application icons.

Activity-3:CreationofparentObject

The screenshot shows the Salesforce Setup interface for the 'Parent' object. The browser address bar displays the URL: `drmgrantsandsciencecollg-b-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w0000040WI/Details/view`. The page title is 'Parent | Salesforce'. The left sidebar contains a navigation menu with options: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main content area is titled 'Details' and includes an 'Edit' button and a 'Delete' button. The 'Details' section is divided into two columns. The left column contains the following fields: Description, API Name (Parent__c), Custom (checked), Singular Label (Parent), and Plural Label (Parents). The right column contains the following fields: Enable Reports (checked), Track Activities, Track Field History, Deployment Status (Deployed), and Help Settings (Standard salesforce.com Help Window). The Windows taskbar at the bottom shows the search bar and several application icons.

Milestone-3:LightningApp

Activity:CreatetheSchoolManagementapp

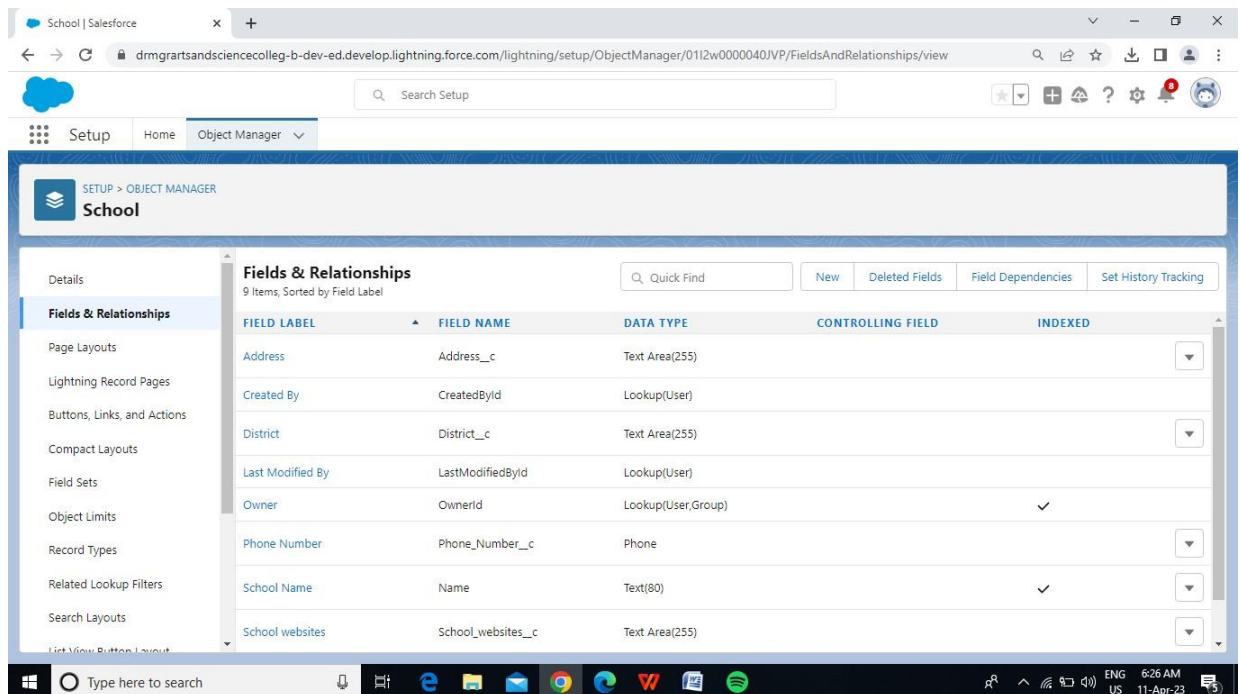


The screenshot shows the Salesforce App Manager interface. The left sidebar contains a navigation menu with options like Setup, Home, and Object Manager. The main content area displays a list of 23 items, sorted by App Type and filtered by All appmenuitems - TabSet Type. The list includes columns for App Name, Developer Name, Description, Last Modified, and App Type. The 'School Management' app is highlighted in the list.

App Name	Developer Name	Description	Last Modified	App Type
Subscription Management	RevenueCloudConsole	Get started automating your revenue processes	29/03/2023, 7:27 pm	Lightning
Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and mana...	29/03/2023, 7:27 pm	Lightning
Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	29/03/2023, 7:27 pm	Lightning
Service Console	LightningService	(Lightning Experience) Lets support agents work with multi...	29/03/2023, 7:27 pm	Lightning
Sales Console	LightningSalesConso...	(Lightning Experience) Lets sales reps work with multiple re...	29/03/2023, 7:31 pm	Lightning
Sales	LightningSales	Manage your sales process with accounts, leads, opportunit...	29/03/2023, 7:27 pm	Lightning
Lightning Usage App	LightningInstrument...	View Adoption and Usage Metrics for Lightning Experience	29/03/2023, 7:29 pm	Lightning
Salesforce Scheduler S...	LightningScheduler	Set up personalized appointment scheduling.	29/03/2023, 7:29 pm	Lightning
Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your ...	29/03/2023, 7:29 pm	Lightning
School Management	School_Management		31/03/2023, 12:36 ...	Lightning
School Management	Anitha		11/04/2023, 5:32 pm	Lightning

Milestone-4:FieldsandRelationship

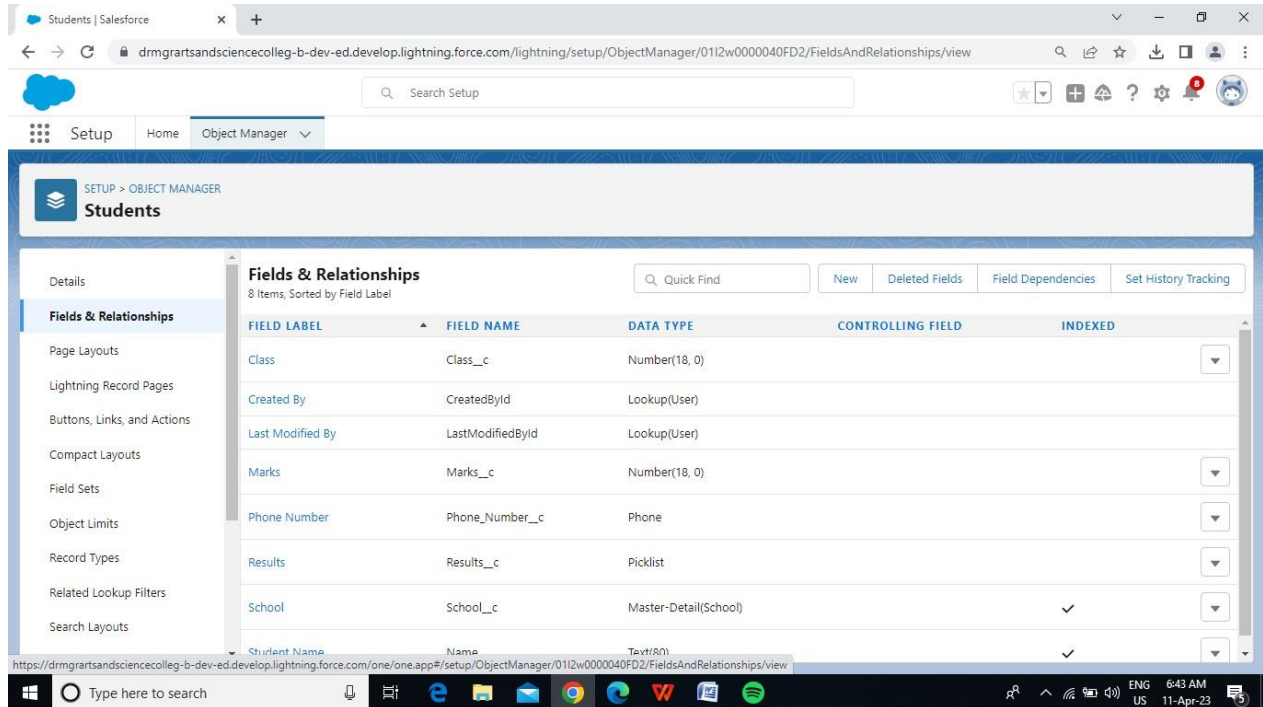
Activity-1:Creationoffieldsfortheschoolobject:



The screenshot shows the Salesforce Fields & Relationships interface for the 'School' object. The left sidebar contains a navigation menu with options like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main content area displays a table of fields and relationships for the 'School' object.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Address	Address__c	Text Area(255)		
Created By	CreatedById	Lookup(User)		
District	District__c	Text Area(255)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Phone Number	Phone_Number__c	Phone		
School Name	Name	Text(80)		✓
School websites	School_websites__c	Text Area(255)		

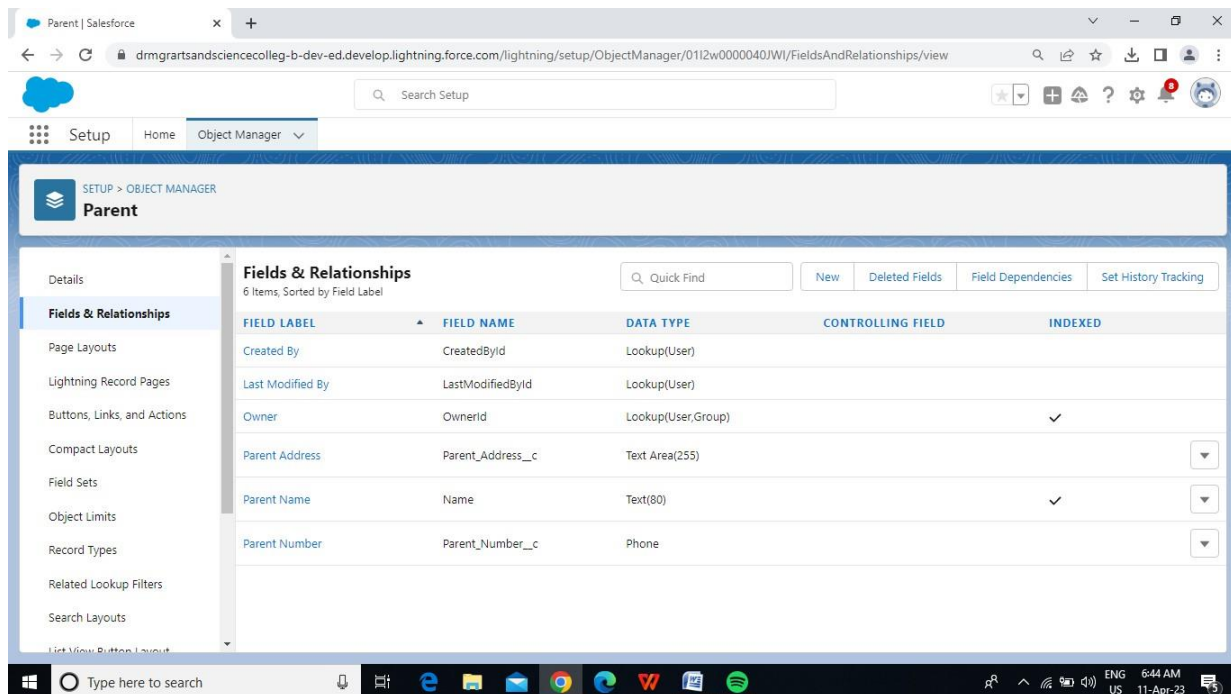
Activity2:Creationof fieldsfortheStudentObject



The screenshot shows the Salesforce Object Manager interface for the 'Students' object. The 'Fields & Relationships' section is active, displaying a list of 8 fields. The fields are sorted by Field Label. The table below summarizes the fields shown:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Class	Class__c	Number(18, 0)		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Marks	Marks__c	Number(18, 0)		
Phone Number	Phone_Number__c	Phone		
Results	Results__c	Picklist		
School	School__c	Master-Detail(School)		✓
Student Name	Name	Text(80)		✓

Activity-3:CreationoffieldsfortheParentobjects



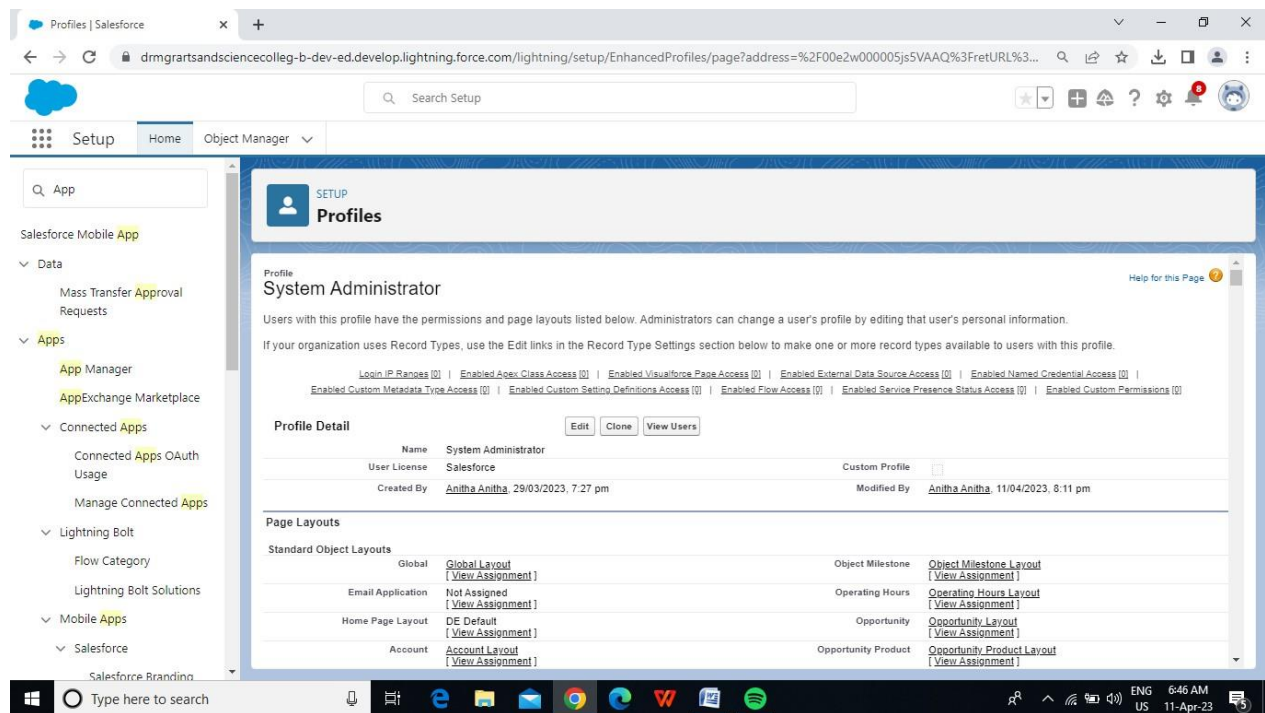
The screenshot shows the Salesforce Object Manager interface for the 'Parent' object. The 'Fields & Relationships' section is active, displaying a list of 6 fields. The fields are sorted by Field Label. The table below summarizes the fields shown:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Parent Address	Parent_Address__c	Text Area(255)		
Parent Name	Name	Text(80)		✓
Parent Number	Parent_Number__c	Phone		

Milestone-5:

ProfileActivity:CreationofP

rofile



The screenshot shows the Salesforce Setup interface for the 'Profiles' section. The left sidebar contains navigation links for Setup, Home, and Object Manager. The main content area displays the 'System Administrator' profile. Below the profile name, there is a list of permissions and page layouts. The 'Profile Detail' section shows the profile name, user license, and creation/modification dates. The 'Page Layouts' section lists various layouts assigned to the profile.

Profile: System Administrator

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

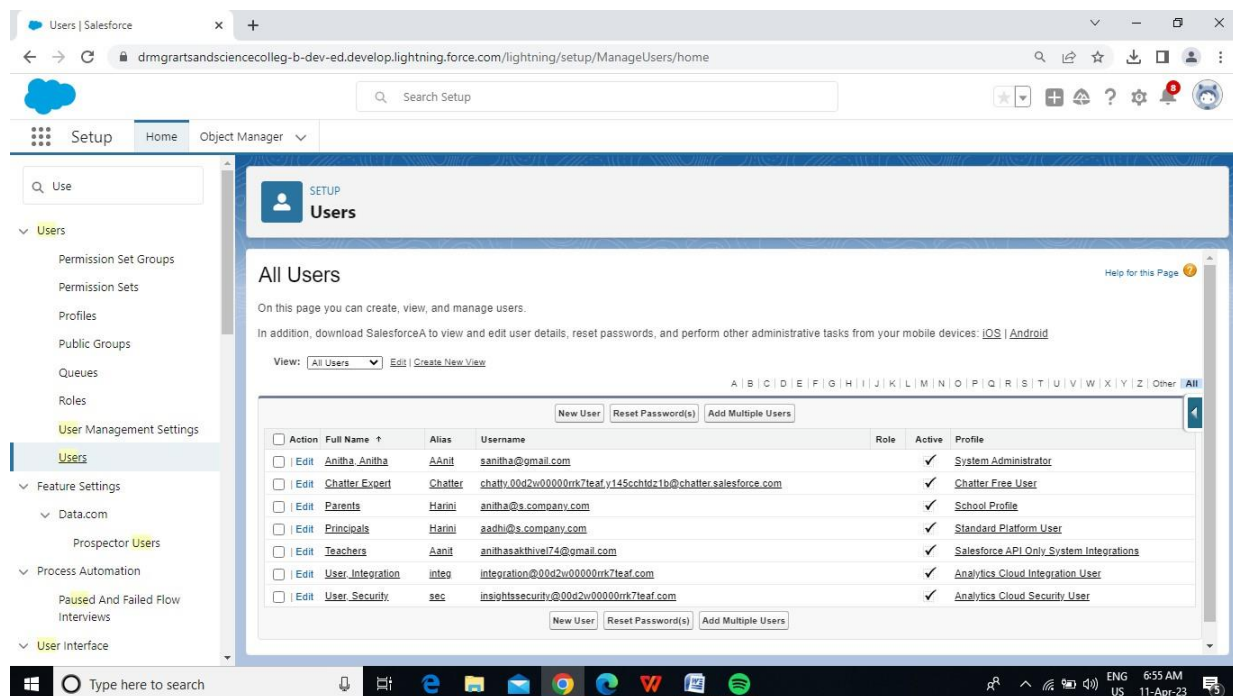
Profile Detail

Name	System Administrator
User License	Salesforce
Created By	Anitha Anitha 29/03/2023, 7:27 pm
Modified By	Anitha Anitha 11/04/2023, 8:11 pm

Page Layouts

Standard Object Layouts	Global	Object Milestone
Global	Global Layout [View Assignment]	Object Milestone Layout [View Assignment]
Email Application	Not Assigned [View Assignment]	Operating Hours Layout [View Assignment]
Home Page Layout	DE Default [View Assignment]	Opportunity Layout [View Assignment]
Account	Account Layout [View Assignment]	Opportunity Product Layout [View Assignment]

Milestone-6:Users



The screenshot shows the Salesforce Setup interface for the 'Users' section. The left sidebar contains navigation links for Setup, Home, and Object Manager. The main content area displays the 'All Users' page. Below the page title, there is a table listing all users in the system. The table includes columns for Action, Full Name, Alias, Username, Role, Active, and Profile. The 'All Users' view is selected, and the table shows a list of users with their respective roles and profiles.

Users

All Users

On this page you can create, view, and manage users.

In addition, download SalesforceA to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices: iOS | Android

View: All Users | Edit | Create New View

Action	Full Name	Alias	Username	Role	Active	Profile
[Edit]	Anitha Anitha	AAnit	sanitha@gmail.com	System Administrator	✓	System Administrator
[Edit]	Chatter Expert	Chatter	chatter.00d2w00000rk7leaf.y145cchdz1b@chatter.salesforce.com	Chatter Free User	✓	Chatter Free User
[Edit]	Parents	Harini	anitha@s.companyc.com	School Profile	✓	School Profile
[Edit]	Principals	Harini	aadhi@s.companyc.com	Standard Platform User	✓	Standard Platform User
[Edit]	Teachers	Aanit	anithasakthivel74@gmail.com	Salesforce API Only System Integrations	✓	Salesforce API Only System Integrations
[Edit]	User Integration	inteo	integration@00d2w00000rk7leaf.com	Analytics Cloud Integration User	✓	Analytics Cloud Integration User
[Edit]	User Security	sec	insightsecurity@00d2w00000rk7leaf.com	Analytics Cloud Security User	✓	Analytics Cloud Security User

Milestone-7: Permission

setsActivity-

1:Permissionset1:

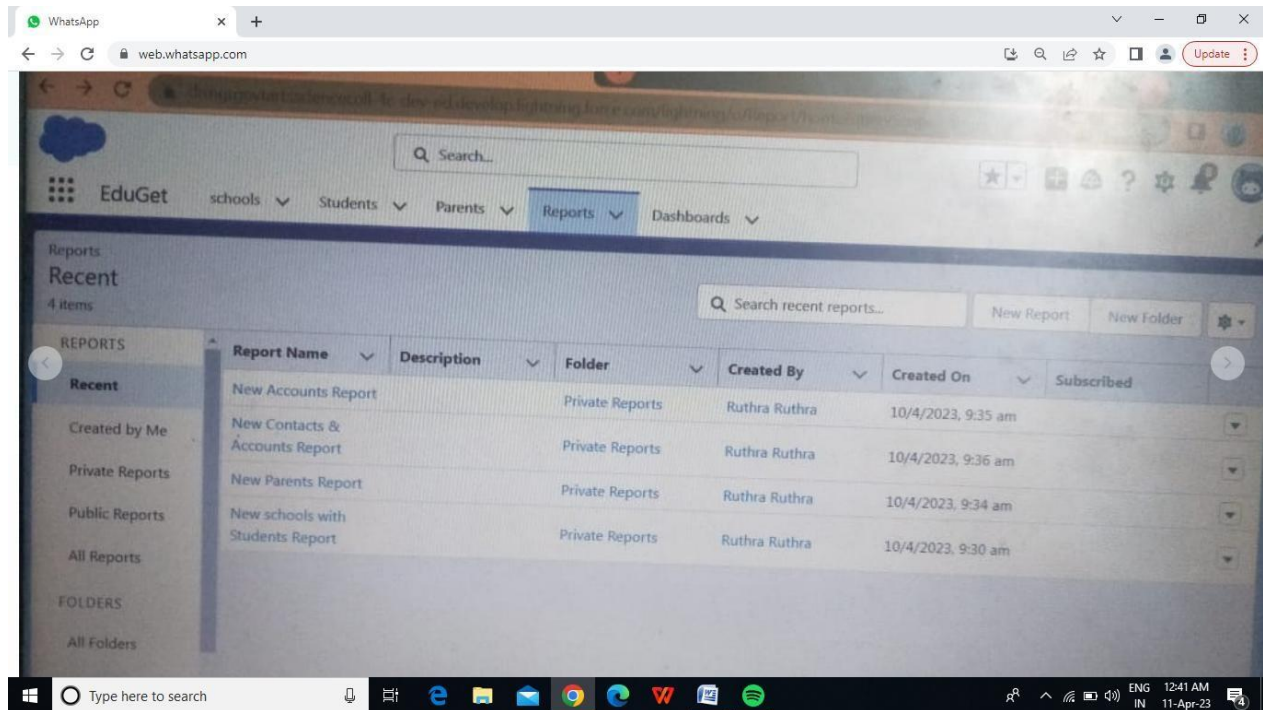
The screenshot shows the Salesforce Setup interface for a permission set named 'principal permission'. The left sidebar contains navigation links such as 'Setup Home', 'Service Setup Assistant', 'Multi-Factor Authentication Assistant', 'Release Updates', 'Lightning Experience Transition Assistant', 'Salesforce Mobile App', 'Lightning Usage', 'Optimizer', and 'ADMINISTRATION' (with sub-links for Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, and Queues). The main content area displays the 'Permission Set Overview' for 'principal permission', including fields for Description, License, Session Activation Required, Last Modified By (Anitha Anitha), API Name (principal_permission), Namespace Prefix, and Created By (Anitha Anitha). Below the overview, there are sections for 'Apps' with links to 'Assigned Apps', 'Assigned Connected Apps', 'Object Settings', 'App Permissions', and 'Apex Class Access'. The bottom of the screen shows the Windows taskbar with various application icons and the system clock indicating 12:28 AM on 11-Apr-23.

Activity-

2Permissionsets2:

The screenshot shows the Salesforce Setup interface for a permission set named 'teacher permission'. The layout is identical to the previous screenshot, with the same left sidebar and main content area. The 'Permission Set Overview' section for 'teacher permission' shows the same fields as 'principal permission', but with the API Name (teacher_permission) and Created By (Anitha Anitha) reflecting the new permission set. The 'Apps' section also contains the same links. The Windows taskbar at the bottom shows the system clock indicating 12:29 AM on 11-Apr-23.

Milestone-8:Reports



4. TrailheadProfilePublicURL

Team Lead -<https://trailblazer.me/id/karuppaiya1>

TeamMember1-

<https://trailblazer.me/id/takash214>

Team Member 2-

<https://trailblazer.me/id/j2jjayaprakash>

TeamMember3-

<https://trailblazer.me/id/ababu219>

5. ADVANTAGES&DISADVANTAGE

ADVANTAGES:

1. Improved Enrolments: A CRM system can help counsellors/ sales representatives to moreeffectively manage and track leads, resulting in improved overall efforts and increasedenrolmentnumbers.

2. **Personalised Communication:** A CRM system allows educational institutions to personalise communication with leads/ prospects or students, resulting in more effective communication and better relationships.
3. **Lead Management:** Educational organisation to more effectively manage leads, including lead scoring, segmentation, and personalised follow-up.
4. **Automated Communication:** Automating communication works wonders for educational organisation, thus, it is one of the most beneficial features of CRM in the Education Industry. It allows counsellors/sales representatives to communicate with leads and students, to keep them engaged and interested over time.
5. **Data-driven decision Making:** A CRM system provides counsellors/ sales representatives with the data they need to make informed decisions about recruitment, marketing, and other vital areas.
6. **Improved student engagement:** CRMs help in improving student engagement by tracking student interactions and providing personalised communication.
7. **Better Communication:** One of the most beneficial reasons to use CRM in education industry is that it improves communication between different departments within an educational institution, helping to increase efficiency and collaboration.
8. **Increased Revenue:** By improving enrolment and student engagement, a CRM system can help educational organisation in increasing revenue.

DISADVANTAGES:

- CRM costs. One of the greatest challenges to CRM implementation is cost....
- Business culture. A lack of commitment or resistance to cultural change from people within the company can cause major difficulties with CRM implementation....
- Poor communication....
- Lack of leadership.
 - 2nd Class Treatment of New Customers.
 - False Rumors.
 - Time Consuming.
 - Too Closeness Isn't Good.
 - Changing Preferences.
 - Require Culture Change.

- DiscountExpectation.
- TrainingCost.

6.APPLICATIONS

Application1:TrackingCustomers

A good CRM helps you understand your market and the needs of your customers. Application 2: Collecting Data for Marketing

A CRM saves important data in extensive customer and contact lists.

. Application 3: Interactions and Improving Communications.

A good CRM helps you maintain great customer relationships with all your clients and let them know what your products and services can do for them.

Application 4: Streamlining Internal Sales Processes

A good CRM helps you streamline your internal sales processes so that there is consistency and quality across your sales team.

Application 5: Planning Your Operations

A good customer relationship management tool will help you understand your current capacity and the demand customers are likely to have for your products and services.

7. CONCLUSION

Customer Relationship Management enables a company to align its strategy with the needs of the customer in order to best meet those needs and thus ensure long-term customer loyalty.